# Project Management (PS)

This case study explains the project management process in detail and thus fosters a thorough understanding of each process step and underlying SAP functionality.

**Product**
SAP S/4HANA 2023
Global Bike

Fiori 3.0

**Level**
Beginner

**Focus**
Project Management

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**Version**
4.3

**Last Update**
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**MOTIVATION**

In Project Management, a simple cost project will be created, which will be used to plan and control the development of an ultra-light racing bike.

The project will be structures using a work breakdown structure (WBS) and network activities. In the Execution phase we will post actual dates and actual costs on activities and WBS elements.

**PREREQUISITES**

Before you use this case study, you should be familiar with navigation in the SAP system.

**NOTES**

This case study uses the Global Bike data set, which has exclusively been created for SAP UA global curricula.

**SAP University Alliances**

## ■ Process Overview

**Learning Objective** Understand and execute an integrated project planning. **Time** 115 Min.

**Scenario** To edit a complete project planning process, you will take different roles in Global Bike, e.g. Production Supervisor and Cost Accountant. Overall, you will be working in the Project Management (PS) and Financial Accounting (FI) departments.

**Employees involved**      Jun Lee (Production Manager)
Jermain Kumins (Shop Floor Worker)
Silvia Cassano (Controller)
Jamie Shamblin (AR Accountant)

At the beginning of your project you assign WBS elements, activities and milestones at Project Builder. Also, you assign milestones to your project.

In the last few steps, you create a creditor invoice for your business partner, who acts as an intermediary for the test driver and you have to pay for the entire project.
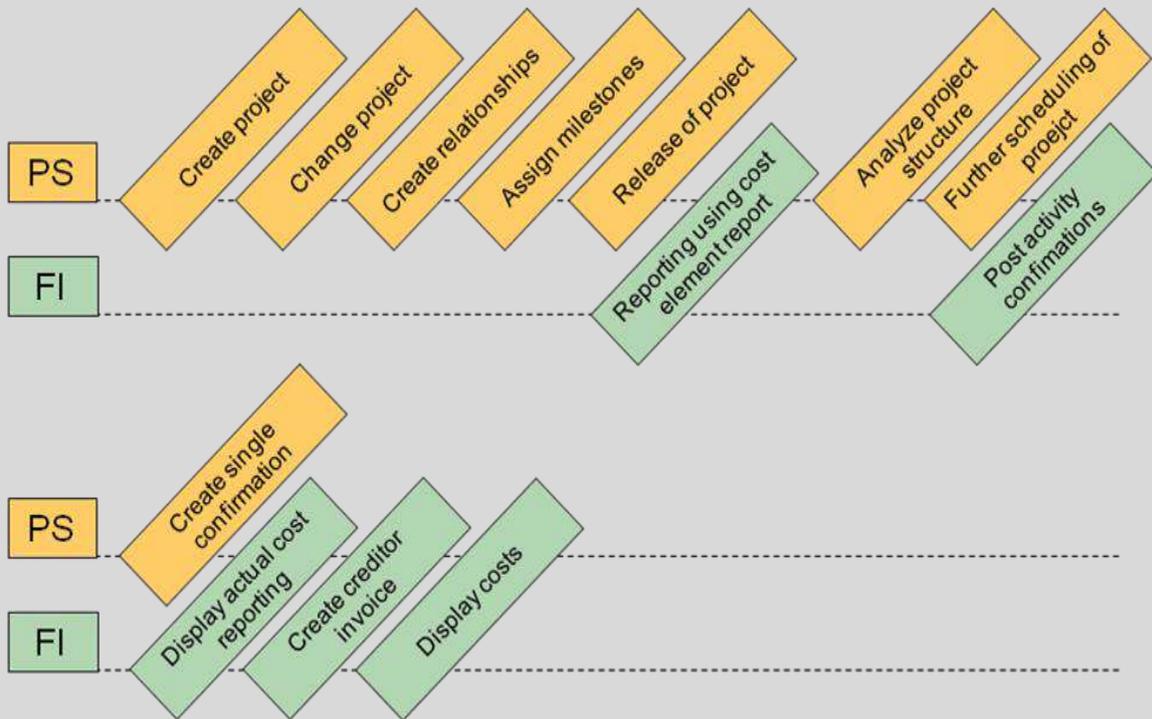
## Table of Contents
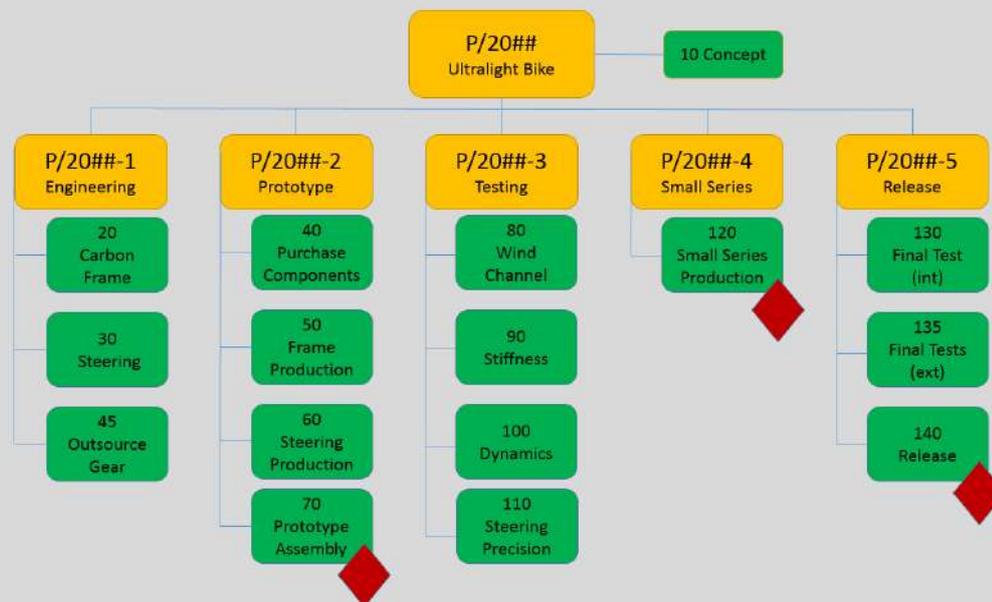
## Step 1: Create Project

**Task** Create a new project.        **Time** 15 min

**Short Description** Use the SAP Fiori Launchpad to create a new project.

**Name (Position)** Jun Lee (Production Manager)

This is the Project structure of cost project P/20##, which consists of WBS elements, activities, and milestones.
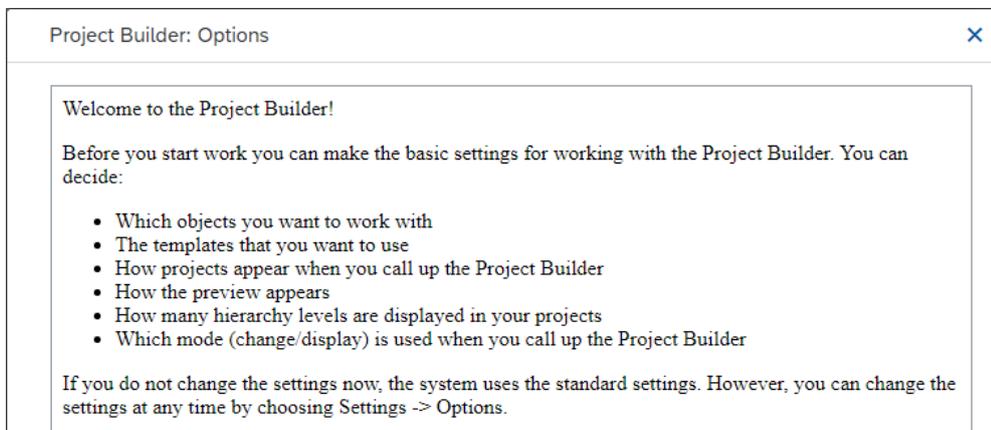


We will use the project builder to create a project "Development of Ultralight Bike". The project consists of a work breakdown structure and network activities.

**Note** A Work Breakdown Structure (WBS) is a model of a project and shows the required project activities in a hierarchical form. The WBS forms the basis for all subsequent planning tasks in the project. Emphasis is placed on planning, analysis, description, control, monitoring of costs, basic dates, and the budget. Costs, dates, resources, and payments are planned using the activities extrapolated to specific WBS elements.

To create a new project, use in the *Project System* area in the role *Production Manager* the app *Project Builder*.

**Project Builder**

If the following pop up occurs *Project Builder: Options,* choose ✔ .

Project Builder: Options                                               ✕

Welcome to the Project Builder!

Before you start work you can make the basic settings for working with the Project Builder. You can decide:

- Which objects you want to work with
- The templates that you want to use
- How projects appear when you call up the Project Builder
- How the preview appears
- How many hierarchy levels are displayed in your projects
- Which mode (change/display) is used when you call up the Project Builder

If you do not change the settings now, the system uses the standard settings. However, you can change the settings at any time by choosing Settings -> Options.

In the popup *Project Builder: User-specific options* enter for Hierarchy levels **99** and select **Preview last project**. Leave other fields as they are.

**Project Builder: User-specific options**

| General | | Processable objects | |
|---|---|---|---|
| Open project with | 1 Structural display | ☐ Simulation | |
| Editing mode | C Change | ☑ Project definition | |
| Hierarchy levels | 99 | ☑ WBS element | |
| ☑ Preview last project | | ☑ Network | |
| ☐ Display deleted objects | | ☑ Network activity | |
| | | ☑ Activity element | |
| | | ☑ Material Component | |
| **Templates** | | ☐ Service | |
| ☑ Individual objects | | ☑ Milestone | |
| ☑ Projects | | ☑ Relationships | |
| ☑ Standard templates | | ☑ PS text | |
| ☐ Simulations | | ☑ Document | |

**History**

Number of Projects     5

**Performance Improvement Options**

☐ Exclude Material Master Data

☐ Exclude Purchase Order History

✓  ✗

Confirm your entries by using the  ✔  button.

To create the project P/2###, select ⬜⌄ and choose *Project*.

**Note** Projects are tasks that have the following characteristics. Projects are usually complex and unique and involve a high degree of risk. They have precise targets that are agreed on between the contractor and the sold-to party. Projects are limited in duration, are cost and capacity intensive and involve several departments. They are subject to specific quality requirements and are of strategic significance for the business carrying them out. Projects are an integral part of the commercial processes of a business. Before you can control all the tasks that occur as part of project execution, you need a project-specific organizational form that should be in a position central to the user departments involved.

In the screen *Project Builder* enter in the field Project def. **P/2###**. Remember to replace ### with your three-digit number, e.g. 003 if your number is 003. For Text (unlabeled) enter **Development of Ultralight Bike ### (I)** and select in Project Profile **DE01000 Cost projects (Europe)**.

P/2###

Development of Ultralight Bike ###(I)

Cost projects (Europe)

**Identification and view selection**

Project def.: P/2111 — Development of Ultralight Bike 111 (I)

Detail:

Overview(s):

Basic Data | Control | Administration | Long Text | Collect. PR Indicators | User Fields

Project Profile:* DE01000 Cost projects (Europe) — Transfer to proj.def

Confirm your entries by pressing Enter. Click on the ▲ WBS Element Overview icon to create new WBS elements. Fill in the following data in the Project Builder screen. Please notice that the system will deduce the project number from the entry. Special characters such as double quotes can be configured in the SAP customizing menu.

| Level | WBS-element | Description | PE | Acct |
|---|---|---|---|---|
| 1 | P/2### | Development of Ultralight Bike | ☑ | ☑ |
| 2 | P/2###-1 | Engineering | ☑ | ☑ |
| 2 | P/2###-2 | Prototype | ☑ | ☑ |
| 2 | P/2###-3 | Testing | ☑ | ☑ |
| 2 | P/2###-4 | Small series production | ☑ | ☑ |
| 2 | P/2###-5 | Release to mass production | ☑ | ☑ |

Again, confirm your entries by pressing Enter, additional fields are automatically added by the system and a project structure is created in the left pane.



**Note** Operative indicators such as the above ("PE" and "Acct") control whether the WBS elements can be used for cost planning (Planning Element) and cost account (Account Assignment possible) purposes.

The hierarchy graphic can be used to edit the project as well. Please note, that the derivation of WBS element structure has determined the hierarchy from the number of the WBS elements. Naturally, this works only for numbers, which reflect a hierarchical order and are customized by a so-called number mask.

To assign responsible cost centers to the WBS elements, select the *Responsibilities* tab. Enter the following data in the Responsible cost center column.

| WBS element | Resp.cost cntr |
|---|---|
| P/2### | EURD1000 |
| P/2###-1 | EURD1000 |
| P/2###-2 | EURD1000 |
| P/2###-3 | EUQM1000 |
| P/2###-4 | EUPR1000 |
| P/2###-5 | EUQM1000 |

Confirm your entries with enter. The system automatically adds the associated controlling area EU00.

| | S | Lev | WBS element | Applican... | Applicant | CA ... | Resp. cost cntr |
|---|---|---|---|---|---|---|---|
| Basic Data | | Organization | **Responsibilities** | Control | Overview | | |
| ☐ | 🖰 | 1 | P/2111 | | | | EURD1000 |
| ☐ | | 2 | P/2111-1 | | | | EURD1000 |
| ☐ | | 2 | P/2111-2 | | | | EURD1000 |
| ☐ | | 2 | P/2111-3 | | | | EUQM1000 |
| ☐ | | 2 | P/2111-4 | | | | EUPR1000 |
| ☐ | | 2 | P/2111-5 | | | | EUQM1000 |

Save your project with Save .

✅ Project P/2111 is being created

Click on the home icon SAP to return to the Fiori Launchpad Overview.

☐

## Step 2: Change Project

| | |
|---|---|
| **Task** Change the project. | **Time** 10 min |

**Short Description** Use the SAP Fiori Launchpad to change the project form the task above.

**Name (Position)** Jun Lee (Production Manager)

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The project P/20## will be enhanced by network activities to detail the tasks of the WBS elements). Activities describe the process flow of the project. You can plan dates, resources and costs through network activities as well.

To change a project, use in the *Project System* area in the role *Production Manager* the app *Project Builder*.

<div align="right">Start</div>



Under *Worklist: Description* you will find your project **P/2###** under *Last Projects Processed*. Double-click on the project to open it.

<div align="right">P/2###</div>



**Note** Alternatively, you can also reopen the project via ⧉.

In the *Project Structure: Description* area, select the WBS element Development of Ultralight Bike.

---

| Project Structure: Description | | Identification |
|---|---|---|
| ∨ 🖳 Development of Ultralight Bike 111 (I) | | P/2111 |
| ∨ ▲ Development of Ultralight Bike | | P/2111 |
| | ▲ Engineering | P/2111-1 |
| | ▲ Prototype | P/2111-2 |
| | ▲ Testing | P/2111-3 |
| | ▲ Small series production | P/2111-4 |
| | ▲ Release to mass production | P/2111-5 |

Choose the ⊟ Activity Overview icon. Enter the following data:

| Activity | Description | Normal dura-tion in days | Work in hours | Work center |
|---|---|---|---|---|
| 0010 | General concept | 10 | 80 | DVLP1000 |
| 0020 | Engineering of carbon frame | 5 | 40 | DVLP1000 |
| 0030 | Engineering of steering fork | 2 | 20 | DVLP1000 |
| 0040 | Purchasing of components | 1 | 5 | PROC1000 |
| 0050 | Production of carbon frame | 2 | 30 | ASSY1000 |
| 0060 | Production of steering fork | 1 | 10 | ASSY1000 |
| 0070 | Prototype assembly | 8 | 60 | ASSY1000 |
| 0080 | Wind channel test | 1 | 8 | INSP1000 |
| 0090 | Stiffness test | 1 | 6 | INSP1000 |
| 0100 | Testing acceleration dynamics | 1 | 5 | INSP1000 |
| 0110 | Testing steering precision | 1 | 8 | INSP1000 |
| 0120 | Small series production | 10 | 100 | ASSY1000 |
| 0130 | Final test (internal) | 5 | 50 | INSP1000 |
| 0140 | Release to mass production | 1 | 3 | INSP1000 |

Confirm your entries by pressing Enter.

**Int. Processing**   Ext. Processing   Prim. Costs   Total

| Acti... | Description | Norma... | No... | Work | Un... | Work Ce... | Plant |
|---|---|---|---|---|---|---|---|
| 0010 | General concept | 10 | DAY | 80.0 | HR | DVLP1000 | HD00 |
| 0020 | Engineering of carbon frame | 5 | DAY | 40.0 | HR | DVLP1000 | HD00 |
| 0030 | Engineering of steering fork | 2 | DAY | 20.0 | HR | DVLP1000 | HD00 |
| 0040 | Purchasing of components | 1 | DAY | 5.0 | HR | PROC1000 | HD00 |
| 0050 | Production of carbon frame | 2 | DAY | 30.0 | HR | ASSY1000 | HD00 |
| 0060 | Production of steering fork | 1 | DAY | 10.0 | HR | ASSY1000 | HD00 |
| 0070 | Prototype assembly | 8 | DAY | 60.0 | HR | ASSY1000 | HD00 |
| 0080 | Wind channel test | 1 | DAY | 8.0 | HR | INSP1000 | HD00 |
| 0090 | Stiffness test | 1 | DAY | 6.0 | HR | INSP1000 | HD00 |
| 0100 | Testing acceleration dynamics | 1 | DAY | 5.0 | HR | INSP1000 | HD00 |
| 0110 | Testing steering precision | 1 | DAY | 8.0 | HR | INSP1000 | HD00 |
| 0120 | Small series production | 10 | DAY | 100.0 | HR | ASSY1000 | HD00 |
| 0130 | Final test (internal) | 5 | DAY | 50.0 | HR | INSP1000 | HD00 |
| 0140 | Release to mass production | 1 | DAY | 3.0 | HR | INSP1000 | HD00 |

Scroll to the right in the table to the *WBS element* column. All activities up to now have been assigned to the WBS element P/2###, since this WBS element was selected at the beginning.

Enter the following values to distribute the activities to the corresponding WBS elements. Be sure to replace ### with your three-digit number.

| Activity | WBS element |
|----------|-------------|
| 0010 | P/2### |
| 0020 | P/2###-1 |
| 0030 | P/2###-1 |
| 0040 | P/2###-2 |
| 0050 | P/2###-2 |
| 0060 | P/2###-2 |
| 0070 | P/2###-2 |
| 0080 | P/2###-3 |
| 0090 | P/2###-3 |
| 0100 | P/2###-3 |
| 0110 | P/2###-3 |
| 0120 | P/2###-4 |
| 0130 | P/2###-5 |
| 0140 | P/2###-5 |

Confirm your entries with Enter. The project structure updates and the network activities can be seen under the associated WBS elements.
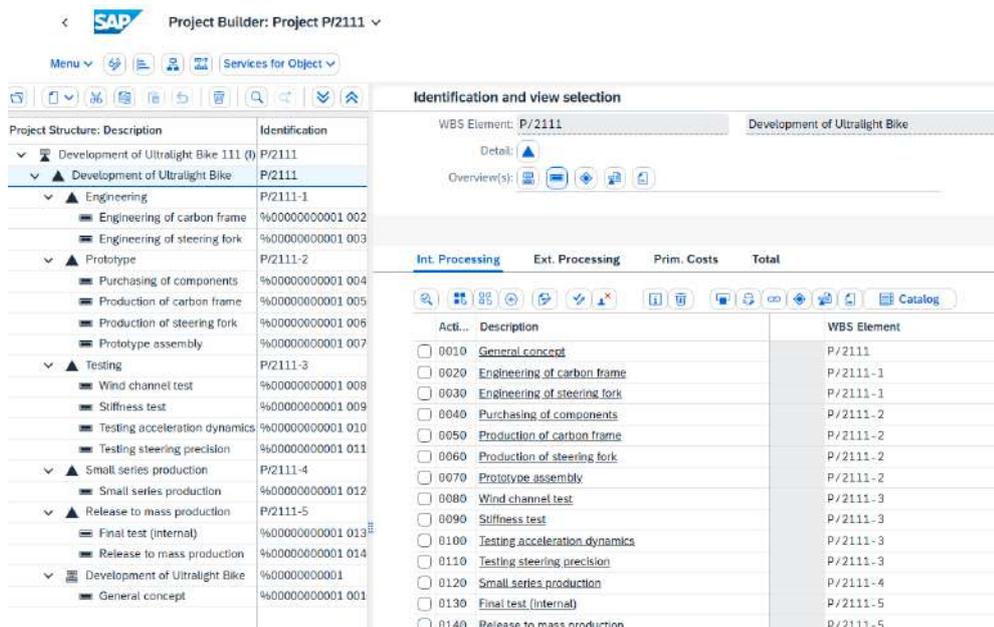


Navigate to the *External Processing* tab to create external processing operations. Maintain a service operation with the following data:

**Note** You use external processing operations to determine which services are required from other companies for the execution. External processing operations are handled by the purchasing department.

In-house processing operations, on the other hand, determine the output of machines and/or people to be performed. You can evaluate the capacity

utilisation at the workplaces, schedule capacities differently if necessary and distribute work among the employees.

In the Activity field enter **0045** and activate the **Service** Field and enter **Outsourcing gear** in Description.

| Acti... | Service | Description | Info Rec. | Purch | Pri... |
|---------|---------|-------------|-----------|-------|--------|
| ☐ 0045 | ☑ | Outsourcing gear | | DE00 | ☐ |
| ☐ 0160 | ☐ | | | DE00 | ☐ |

Confirm your entries by pressing Enter. In the *Service Specification: Ext. Specs f. Task List Maintain* screen enter in the first line 10**,** in the field *short text* **Engineering**, choose for *Quant*. **1**, for *Unit* **EA** and in *Gross price* **2000**.

In the second line 20 enter for the *short text* enter **Ext. production**, choose **1** for *Quant*., **EA** for *Unit* and enter *Gross price* **3000.**

| Line | Del... | Service No. | Short Text | Quantity | Un | Gross Price | Crcy |
|------|--------|-------------|------------|----------|-----|-------------|------|
| ☐ 10 | ☐ | | Engineering | 1 | EA | 2,000.00 | EUR |
| ☐ 20 | ☐ | | Ext. production | 1 | EA | 3,000.00 | EUR |

Confirm your entries with Enter. Go back to the *Project Builder: Project P/2###* screen by pressing once ‹ .

On the *Prim. Costs* Tab enter for *Activity* **0135**, enter **Performance test by professional drivers** in *Description*, for *Amount* **10000** and **6300000** for *Cost Elem*.

| Acti... | Description | Amount | Curr... | Cost Elem. |
|---------|-------------|--------|---------|------------|
| ☐ 0135 | Perfomance test by professional drivers | 10000 | EUR | 6300000 |
| ☐ 0160 | | | EUR | 6300000 |

Confirm your entries, by pressing Enter. Use the Save icon **Save** to save your entries, confirm any messages.

✅ Project P/2111 is being changed

Click on the home icon **SAP** to return to the Fiori Launchpad Overview.

☐

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## Step 3: Display Project Network Graph

| | |
|---|---|
| **Task** Display the project network graph. | **Time** 5 min |
| **Short Description** Use the SAP Fiori Launchpad to display the project network graph. | |
| **Name (Position)** Jun Lee (Production Manager) | |

To display a project network graph, use in the *Project System* area in the role *Production Manager* the app *Project Network Graph*.

Start



Enter **P/2###** in the *Project Definition* search field. The corresponding network is automatically loaded by the system.

P/2###



The interface offers several ways to interact with the network. For example, you can identify loops that have not been noticed in the Project Builder and look at the critical path of the project. Activities of the critical path are highlighted with orange color  Basic Critical .

Further explanations of the graphic can be found in the legend  .

You can see that several tasks were created in the previous step, but they do not yet have any relationships to each other. As a result, all operations currently start at the same time.

Click on the home icon **SAP** to return to the Fiori Launchpad Overview.

☐

## Step 4: Create Relationships

| | |
|---|---|
| **Task** Create the relationship structure. | **Time** 15 min |

**Short Description** Use the SAP Fiori Launchpad to create the relationship structure.

**Name (Position)** Jun Lee (Production Manager)

So far, the activities are all assigned to the top WBS element. In addition, there are no relationships between activities, i.e. activities so far begin all to the same time. This will be changed now.

To create the relationships, use in the *Project System* area in the role *Production Manager* the app *Project Builder*.

Start

**Project Builder**

Under *Worklist: Description* you will find your project **P/2###** under Last Projects Processed. Double-click on the project to open it.

P/2###

**Note** Alternatively, you can also reopen the project via ⬚.

Activities are linked by relationships to establish a chronological order.

In the following, we create the relationship structure as shown in the screen below. The graphic shows schematically the network plan for the development of the ultra-light racing bike. It is intended to serve as a template for the next step when you assign the activities.
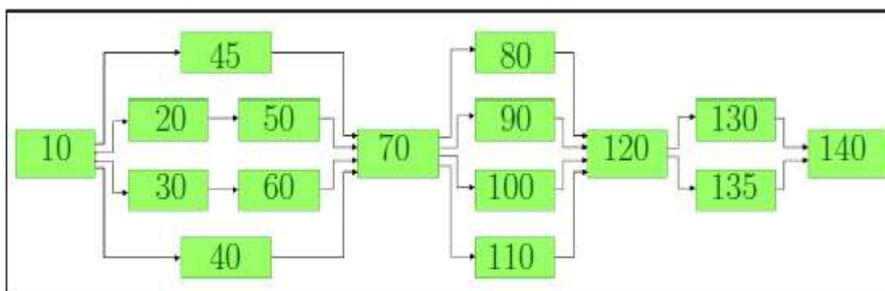
The following example will show to enter the relationships between activities 10, 20 and 50. Please use the same procedure to create all relationships of the image above.

As you can see in the image above as well as in the snippet below, activity number 20 is the successor of activity number 10. In addition, activity number 50 is the successor of number 20. Please keep in mind that only direct relationships between two activities will be created. For example, no relationship between activity 10 and 50 will be entered.



In the *Project Structure: Description* area, select the General Concept activity.



Use the 🔗 Relationship Overview button.

Since we only care about the activities 10, 20 and 50, we will only enter **20** in activity and mark it as successor by selecting the **Scs** flag.

<div style="margin-left:2em">20<br>Scs</div>

**Note** However, keep in mind that later the relationships to operations 30, 40 and 45 will also be maintained in the same way for operation 10.



Confirm your entries by pressing enter.

In the *Project Structure: Description* area, select the *Engineering of carbon frame* operation and switch to the relationship overview 🔗 again.

In this screen you can see that activity 10 was automatically added as a predecessor (flag Scs isn't selected).

Please enter activity **50** and mark it as successor of activity 20 by selecting the **Scs** flag and confirm your entries by pressing enter.

50

Scs



In the *Project Structure: Description* area, select the activity *Production of carbon frame* and switch to the Relationship Overview 🔗 again.

Here, you will notice that activity 20 has automatically been entered as the predecessor.

Now maintain the successor activities for all the remaining activities, as indicated in the illustration above with green activities. Do not forget to also select **Scs** for these activities if they are successor activities.

Use the Save icon 🔵Save to save your entries.

✅ Project P/2111 is being changed

Click on the home icon **SAP** to return to the Fiori Launchpad Overview.

☐

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## Step 5: Display Project Network Graph

| | |
|---|---|
| **Task** Display the project network graph. | **Time** 5 min |
| **Short Description** Use the SAP Fiori Launchpad to display the project network graph. | |
| **Name (Position)** Jun Lee (Production Manager) | |

To display a project network graph, use in the *Project System* area in the role *Production Manager* the app *Project Network Graph*.

Enter **P/2###** in the *Project Definition* search field. The corresponding network is automatically loaded by the system.

P/2###
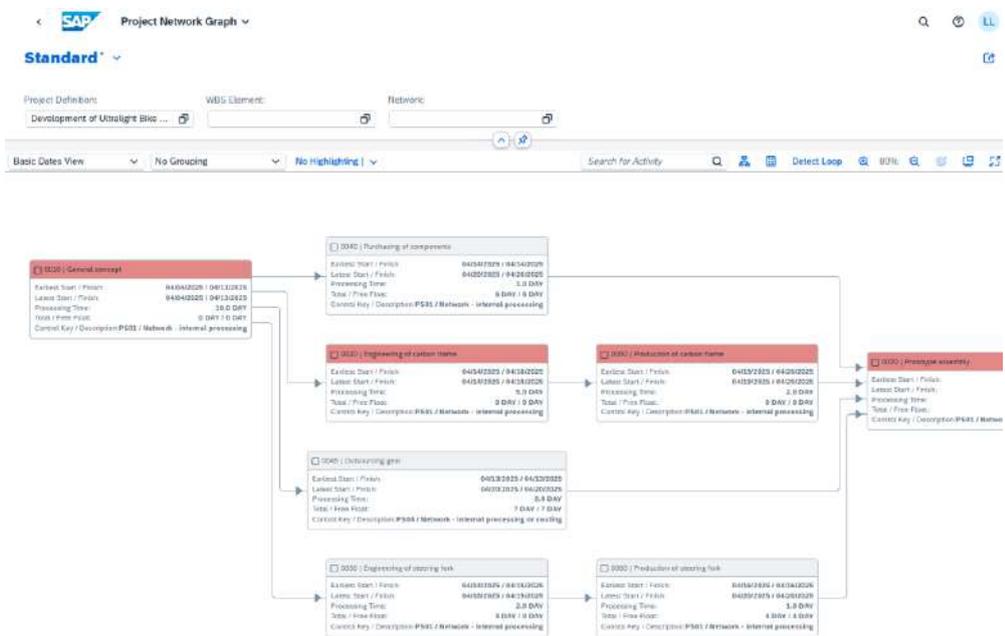


Due to the maintenance of the relationships, the project network graph has now changed accordingly. Activity 0010 | General Design now has four successor activities linked by arrows.

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Click on ⊡ to adjust the project network to your window size or use ⊖ to reduce the view.
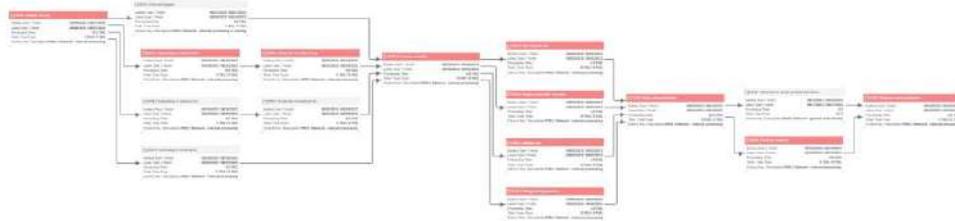


The project network now contains the same arrangement structure as the graphic in the previous step. Only the arrangement of individual connections can vary. Furthermore, you can see the critical path of the project ▇ Basic Critical .

Click on the home icon **SAP** to return to the Fiori Launchpad Overview.

☐

## Step 6: Assign milestones

| | |
|---|---|
| **Task** Assign milestones to activities. | **Time** 10 min |
| **Short Description** Use the SAP Fiori Launchpad to assign milestones to activities. | |
| **Name (Position)** Jun Lee (Production Manager) | |

In the following step, we assign texts (e.g. a functional specification) to the project. We assign milestones to activities, in order to indicate important project stages.

To assign milestones to activities, use in the *Project System* area in the role *Production Manager* the app *Project Builder*.
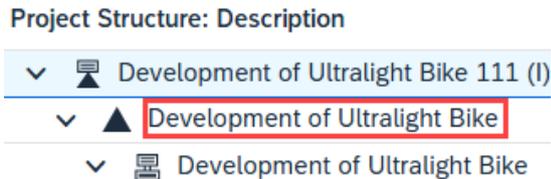
Start

**Project Builder**

Under *Worklist: Description* you will find your project **P/2###** under Last Projects Processed. Double-click on the project to open it.

P/2###

**Note** Alternatively, you can also reopen the project via ⬚.

In the *Project Structure: Description* area, select the WBS element Development Ultralight Wheel.

**Project Structure: Description**

- ⌄ ☰ Development of Ultralight Bike 111 (I)
  - ⌄ ▲ Development of Ultralight Bike
    - ⌄ 🖥 Development of Ultralight Bike

Select 🗐 to switch to the PS Text Overview.

Enter **01** for ST (first column), **PH-###-1** for the description and **DE** as the language key (TT).

01
PH-###-1
DE

### Identification and view selection

| | | |
|---|---|---|
| WBS Element: | P/2111 | Development of Ultralight Bike |
| Detail: | ▲ | |
| Overview(s): | 🖳 ▬ ◈ 🗗 🗐 | |

### PS texts

| | * ST | Text typ | * Description | T | TT | First long txt line | Created by |
|---|---|---|---|---|---|---|---|
| ☐ | 01 | | PH-111-1 | | DE | | |

Confirm the entry with Enter. You can now enter a PS text. To do this, enter any text of your choice. Click on ‹ to return to the Project Builder main screen.

**Note** Important project stages can be indicated and described by project milestones. Milestones are assigned either to WBS elements or to activities of the project and fulfill information and documentation purposes but can trigger business processes such as progress reporting or milestone billing in the case of sales projects. In the following, we create three milestones, assigned to activities 0070, 0120, and 0140.

In the *Project Structure: Description* area, select the activity *Prototype assembly*.

Use the ◈. Milestone Overview icon. For Usage please enter **00004** and by Description enter **Completion: prototype**.

00004
Completion: prototype

### Identification and view selection

| | | | |
|---|---|---|---|
| Activity: | 4000027 | 0070 | Prototype assembly |
| Detail: | ▬ | | |
| Overview(s): | 🖳 🖨 ◈ ⌀ 🗗 🗐 | | |

🔍 🔳 🔲 ⊕    ⊕ Std. milestone    ⊕ Milestone group    🗑

### Milestones

| | Usage | Description | AGrp | Scheduled | Actl. date | POC | Fct | Fix. date |
|---|---|---|---|---|---|---|---|---|
| ☐ | 00004 | Completion: prototype | | | | | ☐ | |

Confirm your entries with Enter. In the *Project Structure: Description* area, the milestone is added below the activity. Select the entry in the project structure to open the details of the milestone.

Complete the milestone data there. Select **Trend analysis**, **Progress analysis** and **Offset to fin**. Leave other fields as they are and confirm your entries with Enter.

Now assign two other milestones to activities 0120 and 0140 analogously. Make sure not to assign these milestones to the same activity 0070 or, worse, to change the milestone, which you just created. Finally, you should be able to display three milestones in the structure tree on the left side.

To do so, use the following data:

For the activities 0120 enter for Usage **00005** and in Description enter **Completion: small series**. Select **Trend analysis**, **Progress analysis** and **Offset to fin**.

For the activity 0140 (Release to mass production) enter for Usage **00006** and in Description enter **Completion: release**. Select **Trend analysis**, **Progress analysis** and **Offset to fin**.

| Project Structure: Description | Identification |
|---|---|
| Development of Ultralight Bike 111 (I) | P/2111 |
| Development of Ultralight Bike | P/2111 |
| Development of Ultralight Bike | 4000027 |
| General concept | 4000027 0010 |
| Outsourcing gear | 4000027 0045 |
| Perfomance test by professional dri | 4000027 0135 |
| Engineering | P/2111-1 |
| Engineering of carbon frame | 4000027 0020 |
| Engineering of steering fork | 4000027 0030 |
| Prototype | P/2111-2 |
| Purchasing of components | 4000027 0040 |
| Production of carbon frame | 4000027 0050 |
| Production of steering fork | 4000027 0060 |
| Prototype assembly | 4000027 0070 |
| Completion: prototype | 10 |
| Testing | P/2111-3 |
| Wind channel test | 4000027 0080 |
| Stiffness test | 4000027 0090 |
| Testing acceleration dynamics | 4000027 0100 |
| Testing steering precision | 4000027 0110 |
| Small series production | P/2111-4 |
| Small series production | 4000027 0120 |
| Completion: small series | 11 |
| Release to mass production | P/2111-5 |
| Final test (internal) | 4000027 0130 |
| Release to mass production | 4000027 0140 |
| Completion: release | 12 |
| PH-111-1 | PH-111-1 |

Use the icon **Save** to save your entries.

✅ Project P/2111 is being changed

Click on the home icon **SAP** to return to the Fiori Launchpad Overview.

## Step 7: Release of Project

| | |
|---|---|
| **Task** Release of the Project. | **Time** 5 min |
| **Short Description** Use the SAP Fiori Launchpad to release the project. | |
| **Name (Position)** Jun Lee (Production Manager) | |

The project will be released. The release of the WBS elements and / or activities of the project are a precondition for the posting of actuals, in the execution phase of the project. In productive environments and for large projects, only those elements will be released which are to be executed in the near future. The release of higher-level WBS elements will also release subordinate WBS elements and / or assigned activities. In the exercises, we release the project definition, thereby releasing all WBS elements and activities of the project.

To release the project, use in the *Project System* area in the role *Production Manager* the app *Project Builder*.

Start

Project Builder

Under *Worklist: Description* you will find your project **P/2###** under Last Projects Processed. Double-click on the project to open it.

P/2###

**Note** Alternatively, you can also reopen the project via ⬚.

Choose Menu **Menu ▶ Edit ▶ Status ▶ Release** to release your project.

Menu bar

The system displays a message that the status for the project has been set.

Use the Save icon **Save** to save your entries.

Click on the home icon **SAP** to return to the Fiori Launchpad Overview.

☐

## Step 8: Reporting Using Cost Element Report

| | |
|---|---|
| **Task** Reporting using cost element report. | **Time** 10 min |
| **Short Description** Use the SAP Fiori Launchpad to report by using cost element report. | |
| **Name (Position)** Silvia Cassano (Controller) | |

By structuring the project using network activities, you have built a quantity structure with internal and external services, which can be totaled as planned costs. When releasing the activities, they are automatically calculated. From now on, planned costs can be evaluated specific to controlling periods (normally months) and specific to calculate elements. The evaluation can be done on a specific activity, but also aggregated to WBS elements and the whole project.

To report, use in the *Project System* area in the role *Controller* the app *Project Costs – Actual/Commitment/Total/Planned in CO Area Currency*.

Start

**Project Costs**
Actual/Commitment/...

If required, enter in database **GL01000** and confirm with ✔.

GL01000

**Enter profile**  ✕

Database prof.:* GL01000

✔ ✕

Enter in the selection screen for Project **P/2###**, in the Controlling Area choose **EU00**, for Plan Version **0**. Enter the **current year** for From fiscal year and in To fiscal year enter the **next year**. By From period enter **1** and in to period enter **12**. Please delete all other field entries.

P/2###
EU00
0
current year
next year
1
12

**Actual/Comm/Total/Plan in COAr Crcy: Selection** ⌄

**Project Management Selections (Other DB profile: GL01000)**

| | | |
|---|---|---|
| Project: | P/2111 | to: |
| Sales document: | | to: |
| WBS Element: | | to: |
| Network/order: | | to: |
| Activity: | | to: |
| Materials in network: | | to: |

**Selection values**

| | |
|---|---|
| Controlling Area: | EU00 |
| Plan Version: | 0 |
| From Fiscal Year: | 2025 |
| To Fiscal Year: | 2026 |
| From Period: | 1 |
| To Period: | 12 |

**Note** The project will usually last until the next year (corresponding to the network activity durations and their relationships). Since a part of planned costs will be assigned to the next year, you would only show a part of the costs when selecting only the current year.

Click on Execute to get an overview of the cost types used. These are divided into actual, commitment, total and planned costs.

```
Act./Cmmt/Total/Plan in CO Area Cur    As of::04/07/2025              Page:    2 /  6

                                                               Column   1 /  4

Object                 PRJ P/2111              Development of Ultra
Name of Person Resp.

From Fiscal Year       2025      To Fiscal Year        2026
From Period               1      To Period               12
```

| Cost Elements | Actual | Commitments | Total | Plan |
|---|---|---|---|---|
| 6300000 Other operating expenses | | | | 10,000.00 |
| 6991000 Cost of Labor | | 5,000.00 | 5,000.00 | 5,000.00 |
| 8000000 Labor | | | | 21,250.00 |
| 8012000 Prod. Wages Overhead | | | | 5,737.50 |
| 8013000 Admin. Overhead | | | | 4,048.14 |
| 8014000 Sales Overhead | | | | 5,397.50 |
| * All Cost Elements | | 5,000.00 | 5,000.00 | 51,433.14 |

**Note** For the network activities, you specified work centers and the amount of work (in units of hours). As for the primary cost activities, you entered the costs directly. These costs are determined by network costing and will be displayed as aggregated costs for WBS elements and for the project definition. The servicing activity resulted in a purchase requisition for the purchasing department, which is displayed as commitment (value type, which displays a future obligation)

Click on the home icon **SAP** to return to the Fiori Launchpad Overview.

☐

## Step 9: Analyze Project Structure

| | |
|---|---|
| **Task** Analyze the project structure. | **Time** 5 min |
| **Short Description** Use the SAP Fiori Launchpad to analyze the project structure. | |
| **Name (Position)** Jermain Kumins (Shop Floor Worker) | |

Using the structure information system, you can analyze the project structure as well as dates, costs and revenues (plan and actuals) of one or many projects. The structure information system does not only display data, but you can edit the project from there or post activity confirmations.

To analyze the project structure, use in the *Project System* area in the role *Shop Floor Worker* the app *Structure Overview*.

Start

Structure Overview

If required, enter in the PS Info Profile filed **GL01000** and confirm with ✔ .

GL01000

In the selection screen enter for Project **P/2###** and leave the other fields as they are.

P/2###

Use **Execute** for the report.



The standard layout shows the project structure overview, the corresponding title texts and the basic and actual dates. However, additional columns can be displayed, e.g. to evaluate the current costs. Furthermore, the structure overview can be updated at any time by clicking on ↻.

Click on the home icon **SAP** to return to the Fiori Launchpad Overview.

## Step 10: Further Scheduling of Project

| | |
|---|---|
| **Task** Further scheduling of the Project. | **Time** 10 min |
| **Short Description** Use the SAP Fiori Launchpad for further scheduling of the project. | |
| **Name (Position)** Jun Lee (Production Manager) | |

In our project, dates have been already planned by the scheduling of network activities. Network scheduling works in principle using the durations of the activities and their relationships. The scheduled dates of the activities are aggregated to the WBS elements (to which the activities are directly assigned). They can be further aggregated within the work breakdown structure (i.e. to the higher level / top-level WBS elements).

To change your project, use in the *Project System* area in the role *Production Manager* the app *Project Builder*.

Start

Project Builder

Under *Worklist: Description* you will find your project **P/2###** under Last Projects Processed. Double-click on the project to open it.

P/2###

**Note** Alternatively, you can also reopen the project via ⬚.

In the *Project Structure: Description* area, select the activity *Performance test by professional drivers (0135)*.

| Project Structure: Description | Identification |
|---|---|
| ∨ 🖥 Development of Ultralight Bike 111 (I) | P/2111 |
| ∨ ▲ Development of Ultralight Bike | P/2111 |
| 🗟 PH-111-1 | PH-111-1 |
| ∨ 🖳 Development of Ultralight Bike | 4000027 |
| ▬ General concept | 4000027 0010 |
| ▬ Outsourcing gear | 4000027 0045 |
| ▬ Perfomance test by professional drivers | 4000027 0135 |
| ∨ ▲ Engineering | P/2111-1 |

Change the Amount in **8000 EUR** and select **Flexible**. Leave the other fields as they are.

**Identification and view selection**

| | | |
|---|---|---|
| Activity: | 4000027 | 0135 | Perfomance test by professional drivers |
| Detail: | | |
| Overview(s): | | |

| Costs | Dates | Assignments | Long Text | User fields | Progress |
|---|---|---|---|---|---|

**Costs**

System Status: REL    SETC      Control Key:* PS03  ☐ Subntwk exists

WBS Element: P/2111      ☐ Project Sum.

Company Code: DE00      Factory Cal. ID: 01

Plant:* HD00      Rqstg Cost Cntr:

Amount: 8000 EUR      Cost Element:* 6300000

Distrib. costs:      Execution Fact:

Normal duration: ☑ Flexible

**Note** Because of the indicator "flexible" the duration of activity 0135 has been linked to the duration of activity 0130, since both activities are "parallel" and activity 0130 has a longer duration. The planned costs of activity 0135 have decreased to 8 000 and are equally distributed over the (flexible) duration of the activity.

Use the **Save** button.

✅ Project P/2111 is being changed

Click on the home icon **SAP** to return to the Fiori Launchpad Overview.

☐

---

## Step 11: Post Activity Confirmations

| | |
|---|---|
| **Task** Post activity confirmations for your project. | **Time** 10 min |
| **Short Description** Use the SAP Fiori Launchpad to post activity confirmations for your project | |
| **Name (Position)** Jamie Shamblin (AR Accountant) | |

In the execution phase, we post actuals (actual dates, actual costs, material movements, capacity utilization) to the project. A prerequisite for the posting of actuals is always the release of the associated project object. We have already released the entire project.

To post activity confirmations, use in the *Project System* area in the role *AR Accountant* the app *Confirm Network Activity*.

Start

Confirm Network
Activity

In the *Network Activities* search, enter your project P/2### and press Enter. Now all the activities of your project are displayed.

Select the *General concept* operation from the list of activities.

In the details of the process, you will see that it is scheduled for 80 hours.



The first part of the processing has taken 35 hours so far. Enter **35** as *actual*. Delete both the *actual start date* and the *actual finish date*.

Select **Calculate** to determine the remainder and processing of the activity.



Press **Confirm** to report the effort.

**Note** The difference between a confirmation and a final confirmation is that after a confirmation the status of the operation is partially confirmed, whereas with a final confirmation the status is set to fully confirmed.



Press **Confirm** again.

You can see that an actual duration of 35 hours has now been reported. Furthermore, the remaining processing time has been reduced from 80 to 45 hours.

**General concept**
45.0
Hours

4000027 / 0010

DVLP1000 / HD Development

Plant Heidelberg

Project P/2111

Earliest Scheduled: 04/07/2025 - 04/16/2025

Latest Scheduled: 04/07/2025 - 04/16/2025

Actual Confirmed:

**Work Overview**
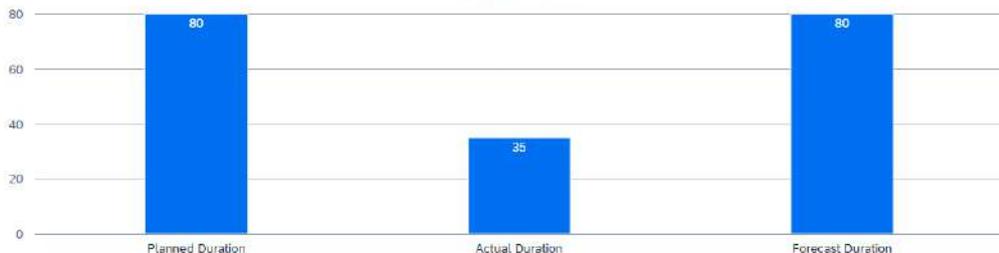


Click on the home icon  to return to the Fiori Launchpad Overview.

## Step 12: Display Actual Cost Reporting

| | |
|---|---|
| **Task** Display the actual cost reporting. | **Time** 5 min |
| **Short Description** Use the SAP Fiori Launchpad to display the actual cost reporting. | |
| **Name (Position)** Silvia Cassano (Controller) | |

The actual costs will be analyzed using the cost element report.

To display the actual cost reporting, use in the *Project System* area in the role *Controller* the app *Project Costs - Actual/Commitment/Total/Planned in CO Area Currency*.

Start

**Project Costs**
Actual/Commitment/...

If required, enter in database **GL01000** and confirm with ✓.

GL01000

**Enter profile** ✕

Database prof.:* GL01000

✓ ✕

Enter in the selection screen for Project **P/2###**, in the Controlling Area choose **EU00**, for Plan Version **0**. Enter the **current year** for From fiscal year and in To fiscal year enter the **next year**. By From period enter **1** and in to period enter **12**. Please delete all other field entries.

P/2###
EU00
0
current year
next year
1
12

Click on [Execute]. You get an overview of the cost types used. These are divided into actual, commitment, total and planned costs.



Due to the confirmation of expenses, actual costs of EUR 1,750 are now reported.

Click on the home icon **SAP** to return to the Fiori Launchpad Overview.

### Step 13: Create Creditor Invoice

| | |
|---|---|
| **Task** Create a creditor invoice. | **Time** 5 min |

**Short Description** Use the SAP Fiori Launchpad to create a creditor invoice.

**Name (Position)** Jamie Shamblin (AR Accountant)

Before the general release for mass production, professional bikers are testing the ultralight racing bikes. After testing, the professionals send an invoice to the enterprise for their service. This leads to further actual costs in the project execution.

To create a creditor invoice, use in the *Project System* area in the role *AR Accountant* the app *Create Incoming Invoices*.

<div align="right">Start</div>



Create Incoming
Invoices

If required enter **DE00** for Company Code.

<div align="right">DE00</div>

In the following screen, enter for Supplier **114###**, choose the **today's date** for the Invoice and enter for Amount **9700**. In the text field enter **Invoice for performance testing ###**.

<div align="right">114###
today's date
9700
Invoice for performance
testing ###</div>

---

Enter **6300000** for *G/L account* and **\*** *for amount in document currency*. Enter **A0** for *tax code*.

6300000
*
A0



Scroll right in the table to the *Network* column. Click in the associated field and select □ to access the value help. Select the *Networks for a Project Definition* tab and enter your project **P/2###** for *Project Definition*. Then press Go.

P/2###



Select your network and confirm the selection with **OK**.

Enter **0135** for *Transaction Number (Transaction no) - Activity*.

Press Enter to confirm the entries. The system completes all further necessary data.

Post the invoice. Use the  icon to post the invoice.

✅ Document 1900000003 was posted in company code DE00

Click on the home icon  to return to the Fiori Launchpad Overview.

☐

## Step 14: Display Actual Cost Reporting

| | |
|---|---|
| **Task** Display the actual cost reporting. | **Time** 5 min |
| **Short Description** Use the SAP Fiori Launchpad to display the actual cost reporting. | |
| **Name (Position)** Silvia Cassano (Controller) | |

To display the actual cost reporting, use in the *Project System* area in the role *Controller* the app *Project Costs - Actual/Commitment/Total/Planned in CO Area Currency*.

**Project Costs**
Actual/Commitment/...

If required, enter in database **GL01000** and confirm with ✓ .

**Enter profile** ✕

Database prof.:* GL01000

✓ ✕

Enter in the selection screen for Project **P/2###**, in the Controlling Area choose **EU00**, for Plan Version **0**. Enter the **current year** for From fiscal year and in To fiscal year enter the **next year**. By From period enter **1** and in to period enter **12**. Please delete all other field entries.

Click on Execute. You get an overview of the cost types used. These are divided into actual, commitment, total and planned costs.

| Act./Cmmt/Total/Plan in CO Area Cur | As of::04/07/2025 | | Page: 2 / 6 |
|---|---|---|---|

Column 1 / 4

Object       PRJ P/2111           Development of Ultra
Name of Person Resp.

| From Fiscal Year | 2025 | To Fiscal Year | 2026 |
| From Period | 1 | To Period | 12 |

| Cost Elements | Actual | Commitments | Total | Plan |
|---|---|---|---|---|
| 6300000 Other operating expenses | 9,700.00 | | 9,700.00 | 8,000.00 |
| 6991000 Cost of Labor | | 5,000.00 | 5,000.00 | 5,000.00 |
| 8000000 Labor | 1,750.00 | | 1,750.00 | 21,250.00 |
| 8012000 Prod. Wages Overhead | | | | 5,737.50 |
| 8013000 Admin. Overhead | | | | 4,048.14 |
| 8014000 Sales Overhead | | | | 5,397.50 |
| * All Cost Elements | 11,450.00 | 5,000.00 | 16,450.00 | 49,433.14 |

Due to the receipt of the invoice, further actual costs of EUR 9,700 are now reported.

Click on the home icon **SAP** to return to the Fiori Launchpad Overview.